

# TPS PROCESS AUTOMATION

Increases Recurring Revenue by 177%,  
Decreases Sales Lead Assignment Time by 80%



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TriZetto Provider Solutions (TPS) is a revenue cycle management company founded in the 1980s and now part of Cognizant, a Fortune 500 technology company. TPS has strong marketing and sales teams that work closely to achieve quarterly and annual revenue goals. These groups concentrate on marketing to physician groups by providing educational and learning opportunities through several different channels.



Cognizant



The result of this integrated approach is the use of the TPS revenue cycle management solutions among more than 33,500 medical practices and 340,000 providers throughout the United States. The company's solutions handle more than 2.7 billion transactions every year.

As part of TPS' sales process, the company uses tools to help its Sales Team act on new leads. Through a structured process improvement initiative, the TPS Marketing Department learned the design and implementation of its current program caused Marketing Qualified Leads (MQL) to languish for up to five days before being assigned to a member of the Sales Team.

## Securing Sales Leads

At TPS, leads are considered Marketing Qualified when they are received as a result of website, webinar or trade show inquiry. This outreach ensures TPS has a large number of leads to meet the demand required by sales. A paper by researchers at the Universiteit Gent explored this concept of customer acquisition through increasing the potential number of prospective customers. This effectively describes the TPS model. *"More prospects are selected, but they are of higher quality. As a result, a greater proportion will be converted into leads and ultimately customers,"* researchers posited.<sup>1</sup>

Nevertheless, if these prospects are left uncontacted, they will never become customers. The TPS process-improvement project functioned on the premise that lead assignment time and related measures could be reduced by automating the existing semi-automated system.

## The hypothesis: faster lead assignment and response time could help TPS close more deals and recognize revenue quickly.

## Existing Process Overview

The existing TPS sales lead process relied on a number of manual and semi-automated processes to move leads from an intake point to Sales Team members for follow up. TPS used a combination of software, including marketing automation tools Salesforce and Pardot, and Microsoft Excel.

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In the existing form, MQLs would get bogged down in three areas:

- Lead assignment;
- Lead distribution; and
- Contact.

Lead assignment typically took at least two days. The process was entirely manual, very involved and necessitated the involvement of three different groups.

Marketing Portfolio Managers would export email clicks from Pardot to an Excel spreadsheet. That information would, in turn, be uploaded to SharePoint. At that point, the Sales Manager would open the Excel document and assign leads to specific members of the Sales Team by typing an individual's name into the document. Then the Business Intelligence department would download the final version of the Excel spreadsheet from SharePoint and upload it to Salesforce where the lead assignments would be accepted as final.

The method depended on the availability of those uploading, downloading and uploading the data to the various systems. When team members were out of the office for any reason, the movement of the sales leads came to a stop until that person returned.

Once the information was in Salesforce, Sales Team members would be able to contact the leads. Unfortunately, the sales leads would often sit for weeks before any calls were made. The end result: **28 days would elapse from the time a prospective customer first interacted with TPS marketing until they were called.**

This is far too long to effectively market and sell to clients and prospects, and, essentially, eliminated any momentum and product interest generated by the website, a webinar or trade show inquiry. The entire sales process took nearly two months from the first incoming contact until a contract was signed.

*"It was really important to measure the new process against the old," explained Jason Schleweis, Director of Digital Marketing, TriZetto Provider Solutions. "We didn't want to just replace one program with another. For the project to succeed, we had to make sure it would have a significant, positive impact on TPS' sales."*

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## Process Improvement

*"The faster sales people can convert leads, the more leads they can process. Using evidence based management, sales organizations can improve their performance by understanding the factors that effect (SIC) the velocity through the sales funnel, allowing them to better allocate resources, qualify leads, and predict and achieve future revenues."*<sup>3</sup>

This is the essential concept TPS adopted as part of the process improvement project. Rather than continue the semi-automated sales lead process, which included a substantial amount of guesswork, the organization looked to fully automate it from beginning to end by applying a set of consistent and repeatable rules. Doing so allowed TPS to better balance leads among the entire Sales Team and ensure contact was made promptly.

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The groups involved in the sales lead transformation were:

- Digital Marketing;
- Portfolio Marketing;
- Sales Team (Business Development, Direct, Client, Revenue Cycle Management Services); and
- Sales Operations.

The entire change process took approximately two months from concept to launch.

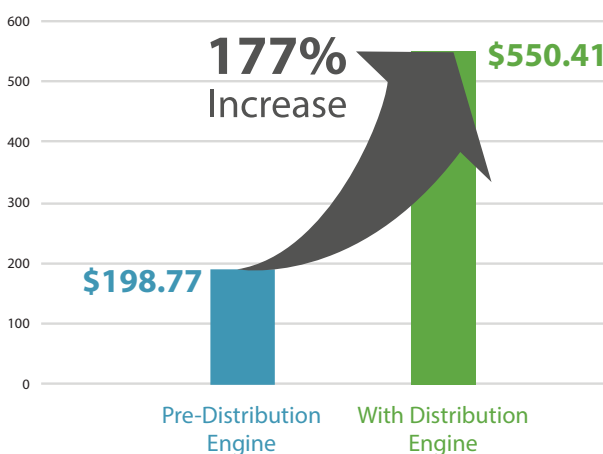
TPS used Distribution Engine, a SaaS program that could be added easily to Salesforce. This software allows TPS to attribute specific rules to leads and assign them without the manual intervention needed in the past for assignment and distribution. This eliminated four steps of a cumbersome and slow process.

High-value leads—those coming in through the website or trade shows—are immediately distributed to members of the Sales Team. These high-value leads are assigned a “shelf-life.” Once assigned to a team member, he or she must contact website leads and trade show leads within four or 48 hours, respectively. If this doesn’t occur, the lead is automatically re-assigned to a new member of the team.

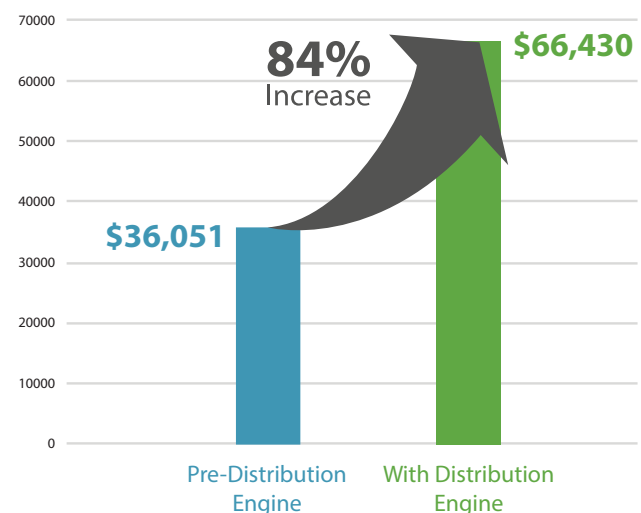
This is an important outcome of how the new process ensures quality leads don’t deteriorate by getting old and the outgoing contact remains relevant to the potential customer.

## Results

### Average Deal Amount/Size for Marketing influenced deals



### Average Total Monthly Sales for Marketing influenced deals

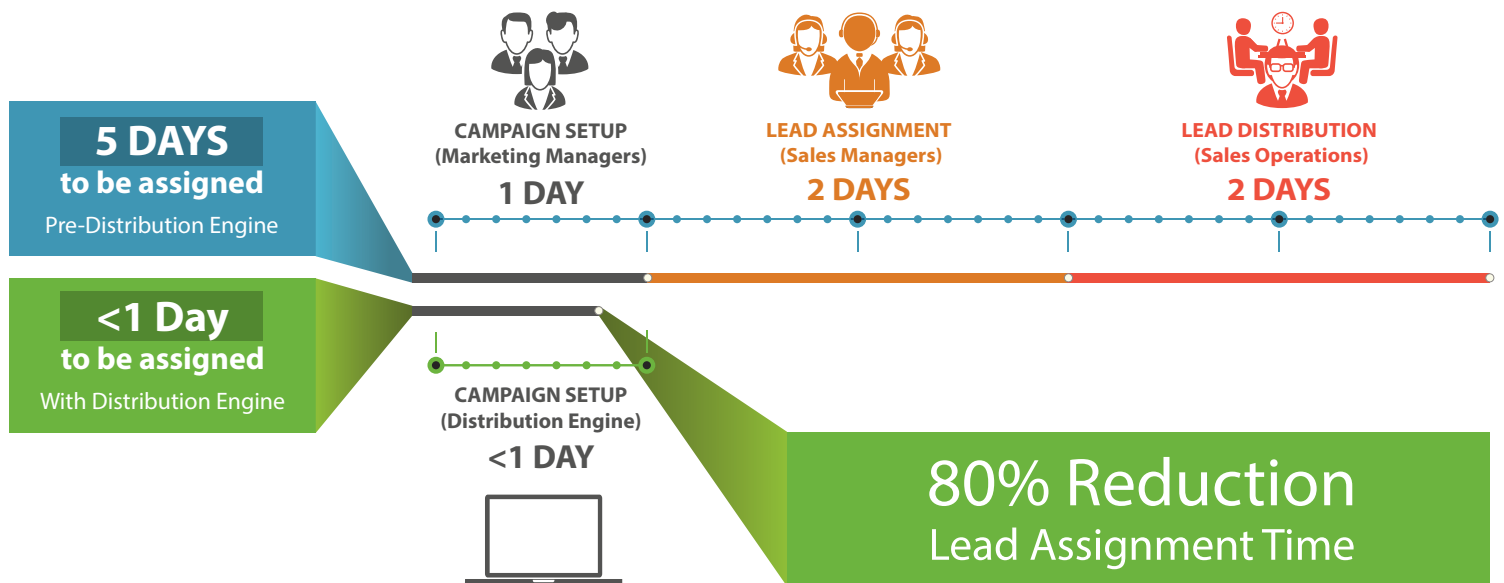


The new process has had four immediate, positive changes to the sales cycle.

- The **time to assign** leads to Sales Team members **decreased 80%** from five days to less than one day.
- The **amount of time** from the day a Sales Team member received an MQL to the day the lead is contacted **decreased 79%** from 28 days to 6.
- The **time to close decreased from 15 days to 12 days.**
- **Marketing-influenced leads led to an increase in the average monthly recurring revenue stream** and the average one-time revenue amount by 177% and 84%, respectively.

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With Distribution Engine, MQLs are sent over in real time, no action needed. It now takes **LESS THAN ONE DAY** to pass leads over to sales.



## Challenges

The implementation of a new process is always a challenge for those making the change as well as those who must work with it each day. The previous sales lead program had been in use for more than two years, so the groups effecting the change knew acceptance could become an issue without early and frequent communication with the Sales Team.

To make the transition easier, the implementation team concentrated on:

- Communication;
- Training; and
- Transparency.

Communication with the Sales Team began long before implementation. The process change group told Sales Team members change was coming and what to expect with the new system. There were no secrets.

Prior to the actual launch of the new system, on-site training was conducted to ensure each member of the Sales Team understood the new process and how to use it day-to-day. In addition, everyone was provided with detailed "How-To" documentation, including visual representations of the new workflow.

Transparency came in the form of addressing Sales Team concerns. The concern focused on ensuring all leads would be distributed equitably. In the past, colleagues would make assignments whereas the process was left to an algorithm living in the software. The assignment process would no longer be visible, and this caused concern. Using the automated process, however, made assignments impartial because the same "rules" applied to every member of the team.

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## Conclusion

The implementation of the automated workflow benefits all of the groups involved in its development and, more importantly, prospective customers who are contacted almost immediately. The new process has allowed TPS to recognize revenue more quickly and assign an ROI to the project as a whole. The new system is now part of a continuous improvement project. It is frequently adjusted and fine-tuned.

*"By integrating sales and marketing, and working together closely, we've improved the sales pipeline, identified MQLs and increased revenue," said Phil Walsh, Chief Marketing Officer, Cognizant Healthcare and Life Sciences. "This is a great example of how having the right people, tools and processes in place leads to great results."*

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## End Notes

1. Jeroen D'Haen, "Model-supported business-to-business prospect prediction based on an iterative customer acquisition framework" (PhD diss. Universiteit Gent, 2013).
2. Dr. William R. Bradford et al., "The Impact of Sales Effort on Lead Conversion Cycle Time in a Business-to-Business Opportunity" (paper presented at the 6th International Engaged Management Scholarship Conference, Paris, France, September 8–11, 2016).

For more information  
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**866.969.3666**

or visit us at:

**TriZettoProvider.com**

## BY THE NUMBERS

**80%**

Decrease in sales lead  
assignment time

**12**

DAYS

Time to close,  
down from 15 days

**177%**

Increase in recurring revenue  
for marketing-influenced deals

**6**

DAYS

Time until the lead is  
contacted, down from 28 days

**84%**

Increase in average total monthly  
sales from marketing-influenced deals

**<1**

DAY

Time to assign leads to sales,  
down from 5 days

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